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ABSTRACT

This study explored the mechanics of using an enhanced, comprehensive multipurpose logic model, the Performance Blueprint, as a means of building evaluation capacity, referred to in this paper as performance measurement literacy, to facilitate the attainment of both service-delivery oriented and community-oriented outcomes. The application of this approach is illustrated in a short case study. By performance measurement literacy is meant the capacity of individuals and institutions to obtain, interpret, and understand performance measurement information and the competence to use such information to benefit clients, service delivery, and the community (P. Long, 2002). In the Performance Blueprint, the expanded logic model used by the Appalachian Partnership for Welfare Reform (APWR), the approach revolves around a representational depiction of an initiative's intended logic, or how inputs are expected to produce outcomes. The Blueprint makes distinctions between effort and effect and between output and outcome. The case study shows the application of the Performance Blueprint to enhance performance measurement literacy in the provision of training and technical assistance to APWR partners working to meet the needs of county-level agencies. One appendix defines andoperationalizes performance measurement literacy, and the other summarizes questions and considerations related to the four quadrants defined by M. A. Friedman (1997). (Contains 22 references.) (SLD)

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# The Performance Blueprint, An Integrated Logic Model Developed to Enhance Performance Measurement Literacy: The Case of Performance-Based Contract Management

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## INTRODUCTION

In this paper I will explore the mechanics of using an enhanced, comprehensive, multipurpose logic model, called the Performance Blueprint, as a means of building evaluation capacity, referred to in this paper as *performance measurement literacy*, to facilitate the attainment of both service-delivery-oriented and community-oriented outcomes. To do this I will first need to define some terms and operationalize some constructs, whose application I then hope to illustrate in a short case study.

## CONTEXT

Before examining the terms and constructs to be used in this paper, I should say a word or two about the setting in which they have their most practical significance. I have been the "outcome evaluator" of the Appalachian Partnership for Welfare Reform (APWR) since its inception in 1998. The APWR is a continuing collaboration funded by the Ohio Department of Job and Family Services (ODJFS), endorsed by the directors in the Ohio Appalachia region and administered by the Institute for Local Government Administration and Rural Development (ILGARD) at Ohio University's Voinovich Center for Leadership and Public Affairs. The *partnership* is intended to facilitate the achievement of federal, state and local welfare reform and workforce development goals throughout the region by building and enhancing administrative infrastructure and capacity among the three APWR partner groups: 1.) the twenty-nine Appalachian County Job and Family Service Agencies, 2) ODJFS central office and regional representatives, and 3) ILGARD. With the assistance of talented colleagues,[1] I am frequently engaged in challenges directly and indirectly related to what Baizerman and co-editors call "evaluation capacity building," which they define as "the intentional work to continuously create and sustain overall organizational processes that make quality evaluation and its uses routine (Baizerman, et al. 2002:1)."[2] The emphasis on this type of capacity building is central to the APWR's Ongoing Performance Measurement and Management (OPM&M) model, components of which are provided to the partners through many of our APWR products and services. These include: Community-Based Welfare-Reform Strategic Planning, Performance-Based Contract Management, Performance-Based Outcomes Management, Workforce Investment Act (WIA) Construction Kit, Ongoing Plan Management (OPM), and the Social Marketing Initiative, all of which can be viewed at http://www.ilgard.ohiou.edu/apwr/.

## TERMS AND CONSTRUCTS

### Performance Measurement v. Program Evaluation

Within the public-sector setting of the APWR, building evaluation capacity has required us to differentiate between "performance measurement" and "program evaluation." The U.S. General Accounting Office (US GAO 1998; see also Hatry 1999) provides a useful and authoritative definition of "performance measurement" and contrasts it with "program evaluation." Table 1 outlines some of the important similarities and differences.

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[1] Ms. Stephanie Howe, APWR Program Manager, as well as Cindy Poole, Dr. Chris Miewald, Karl Runser, and Dr. Barry Oches make up the APWR service delivery team.

[2] M. Baizerman, D. W. Compton, and S.H. Stockdill are the editors of the Spring 2002, Number 93 issue of *New Directions for Evaluation* entitled, "The Art, Craft, and Science of Evaluation Capacity Building."

**Table 1**
**Similarities and Differences between**
**Program Evaluation and Performance Measurement**

| | Program Evaluation (PE) | Performance Measurement (PM) |
|---|---|---|
| **Definition:** | periodic or *ad hoc* studies to assess how well a program is working | ongoing monitoring and reporting of program accomplishments, particularly progress towards preestablished goals |
| **When is it conducted?** | on a periodic or *ad hoc* basis | on an ongoing basis |
| **Who conducts it?** | experts external to the program, either inside or outside the agency, as well as by program managers | program or agency management |
| **Focus:** | PE focuses on broad range of information on program performance and its context | PM focuses on whether a program has achieved its objectives, expressed as measurable performance standards |
| **Scope:** | in-depth examination of program performance and context allowing for an overall assessment of whether the program works and identification of adjustments that may improve its results | PM, because of its ongoing nature, can serve as an early warning system to management and as a vehicle for improving accountability to the public. |

Source: U.S. General Accounting Office (US GAO 1998)

These clarifications have helped the APWR to develop and provide applicable products and services that focus on building much needed "performance measurement" capacity. Accordingly, we make use of a practical definition of performance measurement that is consistent with the GAO's definition and reflective of current efforts to shed light on evaluation capacity building. Performance measurement involves 1) systematically collecting and strategically using information, 2) on an ongoing basis, 3) in an intra- and inter-organizational fashion, and 4) for a variety of internal and external purposes. An explanatory outline for this definition can be found at the website provided above.[3]

**Performance Measurement Literacy**

In an effort to better understand the capacities and competencies associated with performance measurement, we have constructed the concept of *performance-measurement literacy*. By performance measurement literacy we mean "the capacity of individuals and institutions to obtain, interpret, and understand performance measurement information and the competence to use such information to benefit clients, service delivery, and the entire community (Longo 2002)." Performance measurement literacy encompasses a wide range of technical and cultural competencies associated with the

[3] This comprehensive definition of performance measurement is more closely related to the formal definition of evaluation capacity building, as found in Stockdill and others (2002:8), which is, "a context-dependent, intentional action system of guided processes and practices for bringing about and sustaining a state of affairs in which quality program evaluation and its appropriate uses are ordinary and ongoing practices within and/or between one or more organizations/programs/sites."



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systematic collection and strategic utilization of information; however, inclusive, representative, and collaborative stakeholder involvement is a key ingredient for these practices to become fully institutionalized and to result in effective leadership, stronger and more productive communities, and engaged citizens (Burke1998, Clegg & Associates 1999, Fetterman 2001, Gaventa, et al. 1998, and Preskill et al. 2000). Appendix A contains a more detailed explanation of the *performance measurement literacy* construct along with examples of the four inter-related skill sets. We will discuss this construct in the context of the case study at the end of the paper.

**The Performance Blueprint, APWR's Expanded Logic Model**

Like many other approaches rooted in "theory-based" or "theory of change-based" evaluation traditions (Chen & Rossi 1983, Connell & Kubisch 1996; see also Patton 1997: 215-238), the APWR's OPM&M model revolves around a representational depiction of an initiative's intended logic, i.e., how inputs are expected to produce outcomes. OPM&M makes use of an expanded and innovative logic model, called the "Performance Blueprint," as both a planning and evaluation tool.[4] The "Blueprint" is enhanced and strengthened by 1.) an anthropological orientation (Longo 2001b, Longo & Miewald 2000); 2.) a social marketing orientation (Brown 1997, Bryant, et al. 2001, Lefebvre & Flora1988, and Sutton, et al. 1995); and 3.) Mark Friedman's Four-Quadrant Approach to Performance Measurement (Friedman 1997, Friedman, *et al.* 2000). These enhancements have helped the Blueprint exceed the limitations often cited with regard to the use of logic models, most of which focus on how the logic model amounts to little more than a "Procrustean bed" (Stufflebeam 2001:39) that pays little or no attention to the underlying sociocultural and political variables associated with the program's "context" or "environment" (Fisher 2001, Freddolino, *et al.* 1998, Perrin 1998, and EVALTALK 2002). In addition to the traditional elements encompassed by most standard logic models (e.g., inputs, activities, outputs, and outcomes), the Performance Blueprint also requires the identification of direct and indirect beneficiaries (clients, customers, information users, etc.) as well as the direct and indirect service providers (vendors, subcontractors, collaborators, etc.). Moreover, by incorporating Friedman's Four-Quadrant Approach, the Blueprint also offers a transparent strategy for identifying and prioritizing four types of performance measures associated with a program's *effort*-related outputs and its *effect*-related outputs, each of which is further divided into quantity (individual counts) and quality (rate and percentages). This "effort-effect distinction" and its impact on the Performance Blueprint will be discussed in the next section. Closely related to the effort-effect distinction is a parallel distinction that allows the Blueprint to distinguish between Service-Delivery Outcomes (effort-related) and Community Outcomes (effect related). This will be discussed in more detail below.

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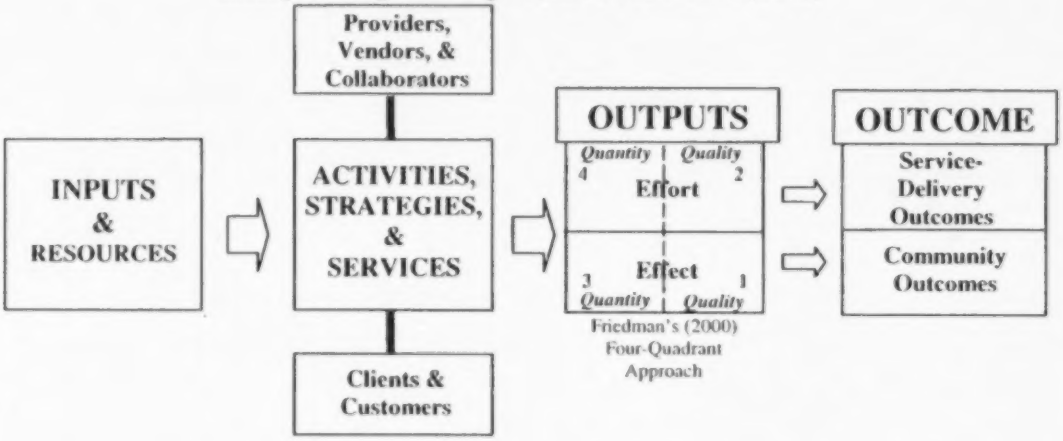
[4] Logic models are visual depictions of what a program can be expected to produce. They have also been called results chains, outcome-sequence charts, strategy maps, and so forth. Wholey (1979) is one of the first to make use of the device and the term. See also Julian, et al. (1995), Julian (1997), McLaughlin & Jordan 1999, Plantz, et al. (1997), United Way of America (1996), and Wholey (1979 & 1997).

## THE EFFORT-EFFECT DISTINCTION AND HOW IT ENHANCES THE PERFORMANCE BLUEPRINT

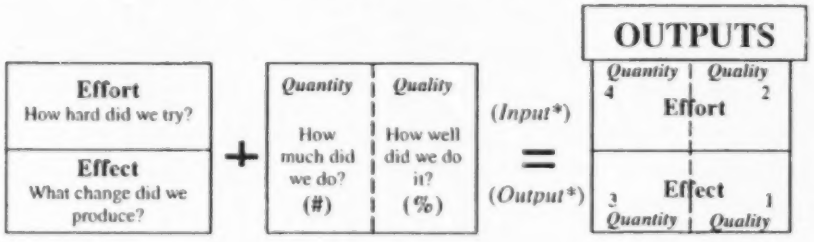
The Performance Blueprint makes use of Friedman's four-quadrant approach as a device for understanding and organizing OUTPUTS. This is illustrated in Figure 1. Before discussing how this insertion sheds light on the scope and scale of OUTCOMES, we will first examine the mechanics and usefulness of distinguishing between "measures of effort" and "measures of effect."

**Figure 1**
**The Performance Blueprint**
**Incorporating an Adaptation of Friedman (2000)**




I should point out that Friedman does not make use of a standard, four-part logic model (e.g., inputs, activities, outputs, and outcomes). Rather, in his Four Quadrant Approach to organizing program performance measures, as depicted in Figure 2, he associates measures of effort with "input" (i.e., process or service delivered) and measures of effect with "output" (i.e., product or client condition achieved). For all practical purposes, Friedman uses the Four-Quadrant Approach as a self-contained logic model; whereas, the Performance Blueprint embeds this four-quadrant schematic into the traditional, linear logic model chain. It should be evident, therefore, why the insertion of this dynamic schematic would have a ripple effect on the other elements of the traditional, linear logic model before and after its insertion.

**Figure 2**
**Friedman's Four Quadrant Approach to Program Performance Measures**



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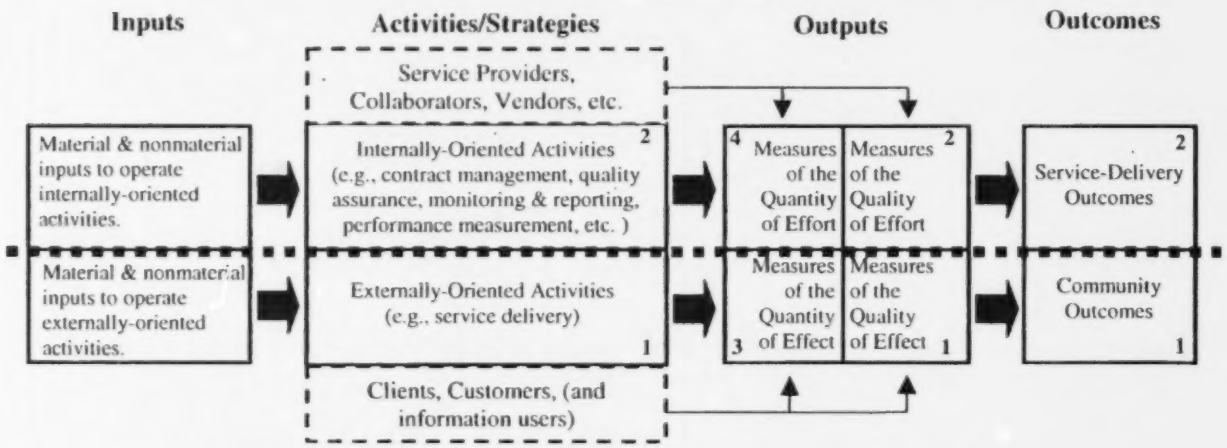
In Friedman's view, which assumes that the reader is a program staff person, measures of effort answer the question, *how hard did we try*? Measures of effect, then, answer the question, *what changes did we produce*? Notice that for each of these two types of measures there is an additional pair of questions that helps to distinguish between *quantity* (how much did we do?) and *quality* (how well did we do it?). Note also that "quantity" (#) will usually represent a number; while "quality" (%), a percentage or a rate of some sort. In this way Friedman offers logical and transparent criteria that make it possible to prioritize and rank the four distinct types of measures: 1.) measures of the quality of the effect; 2.) measures of the quality of the effort; 3.) measures of the quantity of the effect; and 4.) measures of the quantity of effort. A very revealing set of mathematical relationships emerges when the appropriate information is placed into the appropriate quadrant. This paper is not the proper context in which to elaborate on these mathematical phenomena; however, it must be pointed out that, without such foundational information (i.e., the correct denominator) as that which is contained in the fourth-priority quadrant (e.g., number of people served), it would be impossible to achieve any accuracy in calculating any first-priority quadrant information (e.g., the percentage of targeted/reached clients who actually benefited).

I mentioned that the effort-effect distinction has had a ripple effect on the logic and, therefore, potential usefulness of the entire Performance Blueprint. Figure 3 attempts to capture this impact. The dotted line running through the Blueprint

**Figure 3**
**How the Effort-Effect Distinction Echoes throughout the Performance Blueprint**


Inputs
Activities/Strategies
Outputs
Outcomes
Service Providers, Collaborators, Vendors, etc.
Material & nonmaterial inputs to operate internally-oriented activities.
Internally-Oriented Activities (e.g., contract management, quality assurance, monitoring & reporting, performance measurement, etc. )
2
4 Measures of the Quantity of Effort
Measures of the Quality of Effort 2
2 Service-Delivery Outcomes
Material & nonmaterial inputs to operate externally-oriented activities.
Externally-Oriented Activities (e.g., service delivery)
1
3 Measures of the Quantity of Effect
Measures of the Quality of Effect 1
Community Outcomes
1
Clients, Customers, (and information users)

corresponds to the effort-effect distinction and demonstrates that, if one were to distinguish between performance measures of effort and performance measures of effect in Friedman's manner , one could apply the same distinction to Inputs, Activities, and Outcomes. In training sessions we have found it helpful to point out that performance measures of effort and service-delivery outcomes reflect the "performance" of service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providers, collaborators, and vendors. Likewise, the performance measures of effect and community outcomes reflect the "performance" of reached clients and customers.[5]

Appendix B contains some more detailed questions and considerations for identifying and prioritizing performance measures in a manner consistent with Friedman's approach. Table 2 shows a few quick examples.

**Table 2**
**Measuring Outputs (Performance Measures)**

| MEASURES of EFFORT | |
|---|---|
| **Quantity (#)** | **Quality (%)** |
| ***4th Priority***<br>The number of services delivered.<br>The (numerical) amount of effort put into service delivery. | ***2nd Priority***<br>The percentage of service delivery provided well (efficiently & equitably). (e.g., % of hard-to-reach customers reached)<br>The percentage of satisfied customers. |
| **MEASURES of EFFECT** | |
| **Quantity (#)** | **Quality (%)** |
| ***3rd Priority***<br>The number of clients or customers who showed an improvement in well being. | ***1st Priority***<br>The percentage of clients or customers who showed an improvement in well being. |

## THE OUTPUT-OUTCOME DISTINCTION WITHIN THE PERFORMANCE BLUEPRINT

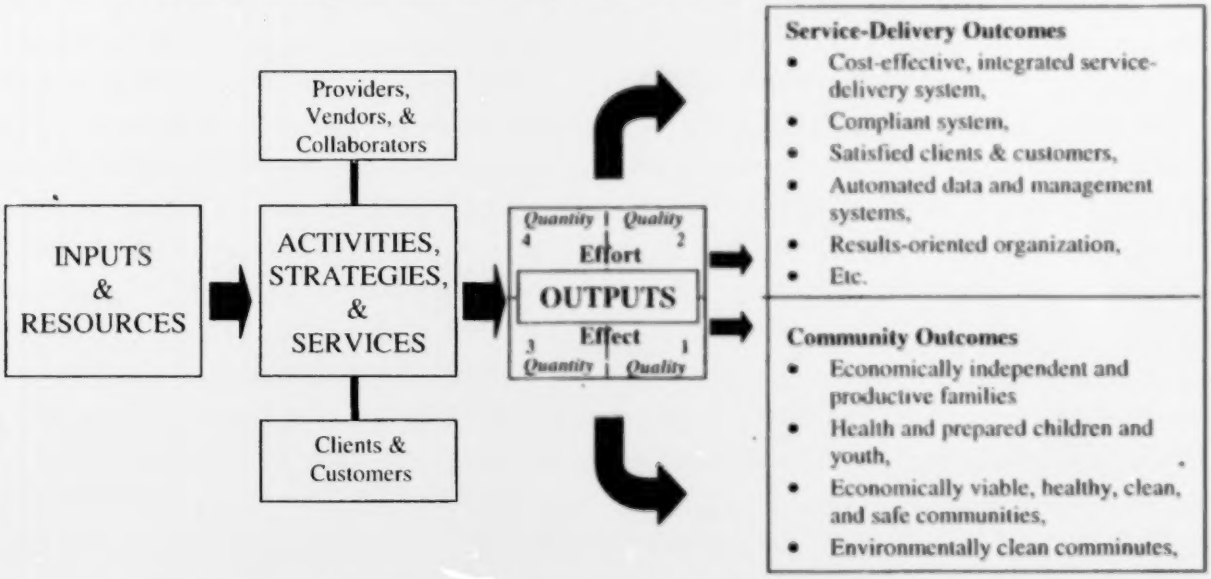
Friedman's approach, particularly the four types of questions he raises in his schematic, calls attention to the immediate and direct performance of resources, planning strategists and strategies, and service-delivery personnel in relation to clients and/or customers who are targeted and reached. This focus has helped our team define and operationalize "outputs" in a way that is much narrower in scope and scale than those of "outcomes." Outputs, accordingly, refer to specific impacts that service providers actually have on the clients/customers that are reached. The "performance" of service providers is gauged by examining their outputs, in terms of how efficiently and how effectively they were able to reach and satisfy their clients'/customers' needs and the extent to which successes along these lines can be associated with the attainment of the overall desired outcomes of the community.

[5] In a previous rendition of the Performance Blueprint I had placed "clients and customers" in the box above Activities/Strategies and "service providers, collaborators, and vendors" under Activities/Strategies. I am grateful to my colleague, Dr. Barry Oches, for pointing out how much more instructionally coherent it would be to align these players with the effort-effect distinction.

Outcomes, in this view, can be understood as the sought-after improvements in the general conditions of the broader community in which "reached" clients and customers live. This may mean the town in which they live, the county, the state, and so forth. At any rate, it is the difference in scale between the whole population and the population actually served. Outcomes are the consequences of outputs, the broad impact of all service delivery on the whole community's development. Community-wide indicators are the proxy measures of the attainment over time of community outcomes; these can include statistics related to economic prosperity, health, education, safety, recreation and so forth.

As outputs can be categorized into measures of effort and measures of effect, so too can outcomes be categorized. Figure 4 attempts to illustrate the extension of these categories.

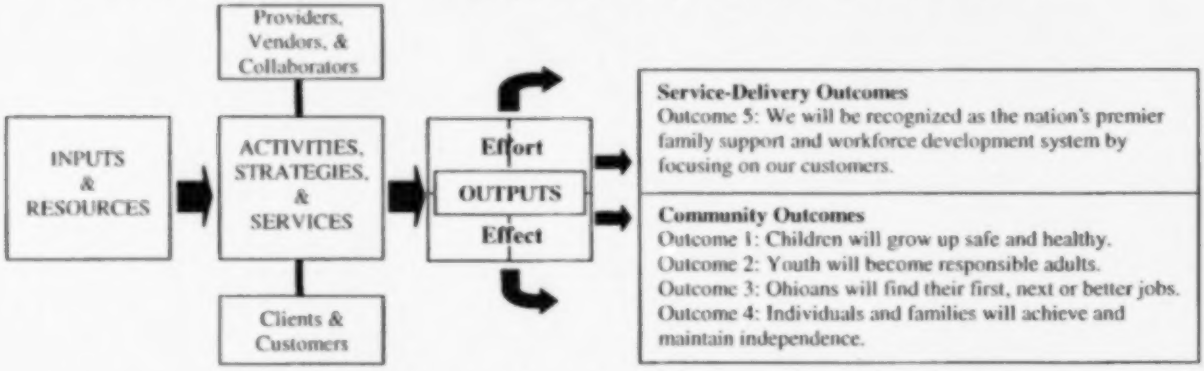
**Figure 4**
**Outcomes as Extensions of Effort-Related and Effect-Related Outputs**




In the obvious heterodoxy that characterizes the use of terms and concepts in outcomes-based performance measurement/management it has been helpful for our team to frame outcomes in this way. Our training participants have commented that it makes sense to distinguish between effort and effect in relation to both outputs and outcomes. Figure 5 shows an application of this logic to the way Outcomes have been defined by Ohio Department of Job and Family Services (ODJFS).[6] The attainment

[6] See ODJFS web page: http://www.state.oh.us/odjfs/aboutus/mission.stm.

**Figure 5**
**An Application of Outcomes Categorized as Extensions of Effort-Related and Effect-Related Outputs: Ohio Department of Job and Family Services**


Providers, Vendors, & Collaborators
INPUTS & RESOURCES
ACTIVITIES, STRATEGIES, & SERVICES
Effort
OUTPUTS
Effect
Clients & Customers
Service-Delivery Outcomes
Outcome 5: We will be recognized as the nation's premier family support and workforce development system by focusing on our customers.
Community Outcomes
Outcome 1: Children will grow up safe and healthy.
Outcome 2: Youth will become responsible adults.
Outcome 3: Ohioans will find their first, next or better jobs.
Outcome 4: Individuals and families will achieve and maintain independence.

of Outcome 5, even though it is last in a list of five outcomes, would surely be a reflection and a consequence of the effort of the entire system's personnel, its leadership, and its organizational culture. Without a serious organizational commitment to these internally oriented, service-delivery outcomes, about which all stakeholders -- especially taxpayers -- have a right to be concerned, few if any externally oriented, community-based outcomes could ever be achieved.

## USING THE PERFORMANCE BLUEPRINT TO ENHANCE PERFORMANCE MEASUREMENT LITERACY: DISCUSSION AND SHORT CASE STUDY

The APWR service-delivery team has been providing training and technical-assistance services to APWR partners within and beyond Appalachian Ohio for nearly four and a half years. Many of these services make use of the Performance Blueprint in our general APWR effort to build evaluation capacity, which as I mentioned above, we describe as enhancing "performance measurement literacy." Based on general participant feedback from the different types of performance-measurement-related trainings that the team provides, we have discovered that our way of organizing the Performance Blueprint has helped county agency personnel -- as well as some ODJFS personnel -- better understand and exceed many of the often-cited limitations surrounding the establishment of performance measurement practices (See Fisher 2001 and Perrin 1998 for example). There is some evidence to suggest a connection between the Performance Blueprint and gains in *performance measurement literacy* among the participants we have trained.[7] I would like to illustrate this by using one of the APWR product/service lines that revolves around the Performance Blueprint, APWR Performance-Based Contract Management.[8]

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[7] Each year the APWR conducts an annual performance assessment. This year's report, the Fourth Annual Performance Assessment, and previous years' report are available on the APWR website at http://www.ilgard.ohiou.edu/apwr/. Participant feedback is furnished in these reports.

[8] To assist me in this illustration I will draw on a follow-up survey completed by trainees six months after training and a summary that Karl Runser prepared for the Fourth Annual APWR Performance Assessment released in October 2002.

**APWR Performance-Based Contract Management**

The APWR's Performance-Based Contract Management products and services are offered to meet the contract management needs of county-level agencies. We facilitate specialized executive leadership seminars, general training workshops, and a three-part series of specialized follow-up roundtable discussions. At the center of the training curriculum are numerous hands-on activities that give participants many opportunities to become familiar with the theoretical and practical features of the Blueprint along with accompanying templates and forms. Participants can use hardcopies of the *Contract Management Manual*, which furnishes photocopy-ready templates and forms or they can use the APWR website, which allows users to download the templates and forms as Word and WordPerfect documents and Excel spreadsheets.

According to follow-up feedback, training in Performance-Based Contract Management has helped participants move closer towards the attainment of the following general *service-delivery outcomes*: regulatory compliance, welfare reform and changing the community perception of the "welfare" agency, cost saving, operating efficiency, increased accountability, consistent application of policies, and movement toward a performance centered model. Accordingly, progress in these areas has made it more possible for agencies to demonstrate their contributions to workforce and economic development and poverty alleviation in general.

Participants also report that training on and exposure to the Performance Blueprint have enabled them to view the establishment of performance-based contract management practices from a "systems" perspective encompassing more than simply the legalistic properties of managing contracts. Of all the products and services offered by the APWR, performance-based contract management generated the highest score when it came to impacts related to "enhancing intra- and inter-organizational collaboration." Many participants reported that, by having the evaluation criteria presented explicitly and logically by means of the "Quads" from within the Performance Blueprint in relation to the other components, such as service providers, intended clients, and overarching outcomes, managing contracts has become less mystifying. Others report that, because of the contextualized focus on "systems thinking" in relation to the community's desired outcomes, RFPs are now being written with performance reporting and relationship building in mind.

One individual, who performs contract management and monitoring services under contract with two Ohio Appalachian County Departments of Job and Family Services, made the following statement, which highlights many of his colleagues' feedback:

> In both counties, we have adopted the methods and terminology of the APWR manual. We constantly refer to the manual as a guide for our contract management. The manual has been extremely effective. It helps to have a comprehensive plan for contract management as described in the manual. The Directors then know exactly where we're going with the process. And contract providers know 'up front'

> what the expectations of the [agency] are. There are few 'surprises' in regard to performance expectations and measurements that emerge after a contract is signed.

Another respondent, an Assistant County Administrator, reported that, "the information and techniques learned during the training helped us to greatly improve our contracting process." He also mentioned that in contrast to the "haphazard" contracting and monitoring system of the past, his agency now has "a contracting process, monitoring system and contract template that give us better control over the services we are purchasing.... Thanks to the training we can now better manage the contractors since all requirements are clearly spelled out in the document."

Several respondents brought up the need for updating the manual and the forms to account for changes in policies and regulations. They called for follow-up training sessions as well, and not only for agency personnel, but also for vendors so that there would be even greater agreement and understanding among contracting parties throughout all phases of the process, i.e., from RFP construction through contract close-out.

These observations directly and indirectly touch on the four skill sets brought to light by the *performance measurement literacy* construct. Having previously provided general training and technical assistance in performance measurement to local agencies in relation to strategic planning, board development, and other multipurpose forms of outcomes and performance management, the team was somewhat surprised to discover that our contract management products and services were becoming well received and popular. After all, contract management has never been known as a source of exciting opportunities to demystify an organization's mission, to build collaborative partnerships, to become a learning organization, and to document the achievement of results and accomplishments that usually go unnoticed. Granted, not all of this positive reception and popularity can be attributed to the Performance Blueprint or the *performance measurement literacy* construct. However, these devices did help agency personnel recognize that, in fact, they more frequently exercise skills from Set #1 and less frequently skills from Sets #2, #3, and #4 as shown in Appendix A.

For far too long agency personnel have been required to do little more than collect information that then disappears before having local applicability. The *performance measurement literacy* construct helps to identify two important needs: 1.) the need for political/organizational/cultural skills in relation to both collecting and using performance information, and 2.) the need for both technical/statistical and organizational/cultural skills in the general area of strategically using performance information. Successes along either of these two lines will converge with current efforts aimed at building and cultivating learning and/or evaluation cultures (Davidson 2001, Wenger 1998, and Trochim 1999, Longo 2001b, and Longo & Miewald 2000).

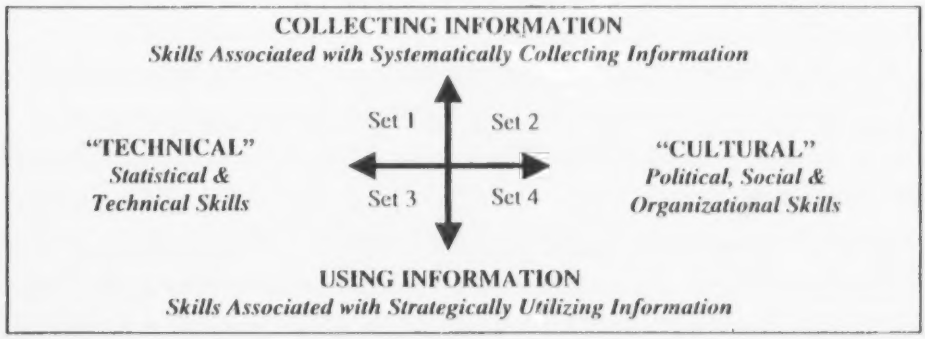
**Conclusion**

The value of the Performance Blueprint has begun to become evident by virtue of the fact that a small but growing number of agencies have begun to institute practices amounting to changes in their standard operating procedures and, in turn, their organizational cultures. Some of this is due to the socio-technical mechanics within the Performance Blueprint that allow it to operate as a planning and an evaluation tool. However, in and of themselves, tools are lifeless, inactive objects and, therefore, incapable of making a difference. People in organizational settings must use appropriately customized yet standardized tools to make any kind of sustainable difference, whether that means purposefully maintaining a value or adding value by bringing about change or managing transitions already set in motion by other changes. For this reason, as we present the Performance Blueprint as a tool, we also present the holistic *performance measurement literacy* construct as an assortment of skills aligned with the tasks associated with instituting performance measurement practices. These tools were developed to facilitate a better understanding of the differences between measures of effort and measures of effect, the scope of outputs and the scope of outcomes, the technical and cultural skills needed to collect and use performance information. *Performance measurement literacy* combines know-how and do-how for the benefit of those being served as well as those doing the serving.

## Appendix A
## Performance Measurement Literacy Defined and Operationalized

Linked to our working definition of performance measurement (systematically collecting & strategically utilizing information on an ongoing basis in an intra- and inter-organizational fashion for a variety of internal and external purposes), we have defined *Performance Measurement Literacy* is a.) the capacity of individuals and institutions to obtain, interpret, and understand performance measurement information and b.) the competence to use such information to benefit clients, service delivery, and the entire community. Figure 6 and its accompanying chart illustrate our working definition of performance measurement literacy, which is divided into four sets of skills that are determined by the intersection of a collecting – using information skills continuum and a technical – cultural skills continuum.

**Figure 6**
**The Four Skill Sets of *Performance Measurement Literacy***




| **Set 1 contains *technical/statistical skills* in the SYSTEMATIC COLLECTION of performance information.** | **Set 2 contains the *cultural (political, social, and organizational) skills* in the SYSTEMATIC COLLECTION of performance information** |
|---|---|
| • Identifying available, reliable, and useful information sources and indicators that will help to monitor progress<br>• Using databases and technology appropriately to collect and maintain meaningful data and information<br>• Utilizing available information sources and accessible indicators to specify baseline data (i.e., statistical information that can be used as a starting point)<br>• Selecting and targeting a manageable range of indicators that will be tracked and used to gauge progress | • Defining and prioritizing stakeholders' definitions of success (i.e., required and desired outcomes)<br>• Anticipating and accounting for the information needs of multiple internal and external stakeholders<br>• Gathering information from multiple internal and external sources on a routine basis<br>• Focusing on expected changes in target population(s) and/or target social condition(s) (i.e., outcomes as new knowledge, increased skills, changed attitudes & values, modified behaviors, altered statuses, improved conditions, etc.) |
| **Set 3 contains *technical/statistical skills* in the STRATEGIC UTILIZATION of performance information.** | **Set 4 contains the *cultural (political, social, and organizational) skills* in the STRATEGIC UTILIZATION of performance information.** |
| • Using the appropriate methodology to analyze qualitative and quantitative information<br>• Displaying performance measurement information in ways that are clear and meaningful to the audience (this may vary depending upon the audience—their interest, background and literacy skills)<br>• Generating reports to communicate whether and/or to what extent the data and information being tracked meets targeted expectations | • Developing ongoing formative and summative strategies to make use of qualitative and quantitative research and evaluation techniques in response to the needs of newly emerging target populations<br>• Routinely sharing information and data with local stakeholders<br>• Summarizing the periodic findings into recommendations for decision makers and stakeholders<br>• Discovering new applications of performance measurement information |



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**Appendix B**
**Questions and Considerations Related to Friedman's Four Quadrants**

| *MEASURES of EFFORT* | |
|---|---|
| **Quantity (#)** | **Quality (%)** |
| ***4th Priority*** | ***2nd Priority*** |
| HOW MUCH DO STAFF MEMBERS PRODUCE OR DELIVER?<br>HOW MUCH DOES A PARTICULAR PROJECT PRODUCE OR DELIVER?<br># Clients/customers served<br>Are there better, more specific ways to count customers or important subcategories of customers, and list them? (e.g. # of families served, # of children with disabilities served, # of businesses served, etc.).<br><br># Activities performed/Services provided<br>What kind (how many) of activities are performed?<br>What kind (how many) of services are delivered?<br>Convert each activity/service into a measure (e.g. "we train people" becomes # of people trained; "we serve businesses" becomes # of businesses served, etc.) | HOW WELL DO STAFF PROVIDE SERVICES AND PERFORM ACTIVITIES?<br>HOW WELL ARE PROJECTS IMPLEMENTED?<br>HOW WELL DO STAFF PERFORM THESE ACTIVITIES?<br>HOW WELL ARE STAFF PREPARED FOR THE JOB(S)?<br>% Common Measures:<br>Client-staff ratio<br>Staff turnover rate<br>Staff morale<br>Fully trained staff<br>% Satisfied customers<br>% Hard-to-reach customers served<br>% Activity-specific Measures:<br>% Services delivered on time<br>% Clients completing activity<br>% Activities performed correctly and completely<br>% Actions meeting other objective, service-delivery standards or criteria |
| *MEASURES of EFFECT* | |
| **Quantity (#)** | **Quality (%)** |
| ***3rd Priority*** | ***1st Priority*** |
| IS ANYONE BETTER OFF (Individual case counts)?<br>Guiding questions:<br>In what ways could clients be better off as a result of utilizing this service?<br>How would anyone know if clients/customers were better off in measurable terms?<br><br># of clients/customers with increases in:<br>• Skills/Knowledge (e.g., parenting skills)<br>• Attitude (e.g., towards drugs)<br>• Behavior (e.g., school attendance)<br>• Status/Circumstances (e.g., # entered employment, # earnings increase, # in stable housing/living arrangement) | IS ANYONE BETTER OFF (percentages and rates)?<br>Guiding questions:<br>In what ways could clients be better off as a result of getting this service?<br>How would anyone know if clients/customers were better off in measurable terms?<br><br>% of clients/customers with increases in:<br>• Skills/Knowledge (e.g., parenting skills)<br>• Attitude (e.g., towards drugs)<br>• Behavior (e.g., school attendance)<br>• Status/Circumstances (e.g., entered employment rate, % earnings increase, % in stable housing/living arrangement) |

Adaptation of (Friedman 2000)

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